

Exhibit 41
Filed Under Seal

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Subject: Content Partners Update

Content Partner Updates

Apple iTunes/Beats: We're engaged with the iTunes/Beats Music team. Conversations are open and they seem eager to begin a partnership dialogue. A few highlights from my discussion with Ryan Walsh, VP of Product at iTunes (formerly VP of Product at Beats Music, now responsible for music as well as tv/movies):

- The Beats music app will stay up and running as is for now. They will continue expansion into new territories (AU is next up in September – then more to follow quickly).
- They're working to integrate a lot of the Beats employees into the iTunes team in Cupertino. They're keeping the SF office for now, but that may eventually fold into the Cupertino Apple campus.
- The iTunes business is still very healthy despite track downloads being on the decline. They're making a big bet on streaming and the other content businesses are booming.
- iTunes radio is a surprisingly successful product for them. When I told him that we frankly don't see a huge customer demand to support this, he thought it's because of how tightly integrated it is into the iTunes ecosystem and that customers are used to Apple being a bit of a walled garden.
- They're (iTunes) going to open up more platform support including Android. Sonos will continue to be an important integrated partner and they intend on ultimately integrating iTunes Radio & Cloud Service as an offering to our customers. This is, obviously, a major shift in the behavior we've seen from Apple in the past.
- iTunes is working on the best approach to how the two teams/services inter-relate. They're not yet sure how the overall strategy of the content programming is going to play out as Beats has a very distinct curated voice and iTunes is intentionally "person-less" (Ryan's words, not mine). Ultimately, all of the services will work together seamlessly.
- Immediate priorities include getting their content fulfillment back end coordinated with Apple's. He said we will need to figure out how to handle Sonos – and asked if our players can decode 256 kbps AAC streams with FairPlay DRM. I am awaiting technical documentation and a sample file for testing.

A meeting has been requested from iTunes to discuss future plans and our teams will be coming together in the 4-6 weeks. We should align internally to determine what it is we are looking to achieve from this partnership prior to any meeting.

Google: I had an introductory call this past week with Richard Wheeler, the new HW partnership lead for Google Play Music, reporting into Zahavah Levine, Director of Global Music Partnerships (BD). He will be the key partnership owner going forward and will be the day-to-day relationship manager. He's been with Google for under 6 weeks and is working on coming up to speed. Highlights from the call:

- Sonos is his #1 priority at this time but he will also be focusing on partnerships with carriers, OEMs and other CE manufacturers. He admits that Google is late to the game compared to other music services in pursuing these partnerships, but it will be a focus as distribution channels are critical to them for growth.
- Just as Google got a head start over Spotify in Canada, they're laser focused now on Japan. Although they've got more work to do to launch GPM there, they feel as if they're closer than anyone else.
- The "L" release is slated for this fall and the teams may be pulled off of Sonos work from time to time to work on that as it is the company priority.
- Integration of Songza into the product is also a top priority as the investment there was to improve their music product.
- Richard wants to be pulled into all of our standing calls to get up to speed on progress as well as be included in any upcoming F2F meetings. His focus will be ensuring we're aligned on executing a great product experience and also maximizing our partnership opportunities. We've set up a recurring 1:1 to stay in sync.

YouTube Music: Had a check in call with Aaron Lubert, Director of Business Development for YouTube, to get an update on the status of their service launch amidst all of the rumors. Highlights from my conversation:

- YouTube Music is taking longer to roll out than planned, but they're taking their time to get to a better product offering rather than launching quickly. This includes a combined Google Play Music offering for \$9.99 month.
- They've had two significant employee losses, Shiva Rajaraman who lead YouTube's Product Management team, departed recently to take a VP of Product role at Spotify (curious move for Spotify – a video play in their future, perhaps?). Chris LaRosa, product manager for the music service, departed to work on a start up called Flux Factory.
- The new PM for the music service is Ann Turner, we will be getting an introduction shortly.
- The timing for a GA launch is still TBD. They will be launching an invite only beta in mid-late September to test the service and then ramping up to get more users. Sonos will be part of the initial external beta testing pool. I've requested 5 accounts split between SB and Camb.
- The YouTube Music team has gotten a SMAPI implementation working. This, of course, is for their audio-only service but the team says its working well.
- The technical team has also gotten music playing directly from the YouTube Music app to a Sonos speaker (for both iOS and Android – audio only, not audio from video). This was not done in collaboration with the GPM team, they built basic P2S functionality given their experience working with Chromecast as well as the Dial protocol. This was a fast hack together to demonstrate the ability to play to Sonos directly from the music app, but they want to engage with us soon to figure out the experience.
- Because the timing around launch is taking longer than expected, they'd like to explore a "Beats Music-like" launch on Sonos for GA.
- The name "YouTube Music Key" is indeed the name of the service for now, per the rumors. This is likely to change once they get through beta testing.

Spotify: The Sonos/Spotify teams are working well together to define the next generation product features for the holiday (please see Jason/Adam's report for more detail). Likewise, Spotify would like to begin monthly meetings (beginning in late September/early October) to keep discussions active on creating the "ultimate home music experience" together. This extends beyond support of P2S by next summer, they want to work with us define the best in-home music service + Sonos experience. Other key partner highlights/news:

- Spotify will be announcing several new and "significant" Connect HW partners this Friday at IFA.
- Spotify now supports their "freemium" offering on Windows Phone.
- I will be meeting with the Spotify team this weekend at IFA.

Pandora: Working on setting up on-site meeting with Pandora. Goal will be to align and set expectations with them in the next year. We haven't had much movement with them from a product perspective and they're anxious to work with us on how we're going to improve the product offering in the next year. Timing: early October, outreach in progress.

SoundCloud: Meeting with the entire platform partnership team this coming weekend in Berlin at IFA. Most of the team are new hires and based between Berlin and SF. Goal is to understand where they're going in the next year.

Amazon Prime Music: No major updates at this time. We've set expectations that no integration will happen pre-holiday and instead will likely take place next year.

TuneIn Radio: Had a sync up call with them last week. They're keen to begin work to updates their service on Sonos. Those improvements include:

- Support for (optional) user name and log in. This will allow for the mobile experience to extend to inside of the home (for example, favorites added in the mobile app

would reflect in favorites within TuneIn).

- Deliver higher quality artwork associated with stations streaming on Sonos.
- Introduce "The Feed" which is programming that is trending based on popularity and location.
- Reorganize the directory to improve browsing stations and search results.

TuneIn has is slated to do all of this work themselves, and are keen to get this work done that would align with their shift in branding on the Sonos controller (from Radio to Radio by TuneIn). However, given that TuneIn is in every Sonos household and has such high engagement, I'd like the Sonos UX team to be deeply involved in the work they do to ensure we're delivering a better experience. We need this to happen ASAP as TuneIn is already planning and scoping the work. They've requested an in-person meeting with Sonos and UX teams.

BlueNote/TuneIn: We're launching 2 Blue Note stations on TuneIn globally for all Sonos customers this Friday, September 5th. The third station for all that purchase the limited edition PLAY:1 will launch with the availability of the unit (pre-loaded on the root music menu). The DPE team is doing this work to support this feature. The contract and costs are all outlined and will be closed out in the next day or two.

Rdio: Rdio will be rolling out a significant update to their service this September offering a free tier of service. Their focus will be largely on a Pandora-style Radio offering that taps into their licensed catalog of 25 Million tracks (vs. Pandora's limited catalog of roughly 1.2 Million tracks). Unfortunately, the label deals they've done will prevent them from supporting the free tier on Sonos.

WiMP: Relaunching as Tidal in the US with an HD service offering. We have a call set up this week to discuss support for this on Sonos. Working to set up time to meet with their CCO at IFA this weekend.

Other Updates

Travel/PTO:

September 4-6: Berlin for IFA (Meetings with SoundCloud, Spotify, WiMP, Qobuz, Aupeo)

Prioritization Framework: Working with a cross functional group of key stake holders to deliver a succinct partner prioritization framework. These are aspects that should be applied when looking to work with partners. Goal is to get the organization aligned behind what we're doing with partners and why one would be more important than others. Working through another turn of the draft that will be reviewed tomorrow. We feel close and want to get this closed out soon.

Roadmap: No updates.

Please let me know if you have any questions.

My Best,

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